



Carbonates in South Korea

November 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health, innovation, and shifting dynamics in carbonates

INDUSTRY PERFORMANCE

South Korea's "slow ageing" trend fuels growth for reduced sugar carbonates
Flavour innovation seen alongside zero calorie expansion in carbonates

WHAT'S NEXT?

Taste and health concerns expected to shape carbonates in South Korea
Lotte Chilsung aims to ensure transparency, inclusivity and trust through Food QR
Paldo's Pororo Tok achieves certification for its children's carbonates

COMPETITIVE LANDSCAPE

Lotte Chilsung's strategic diversification narrows gap with Coca-Cola
Flavour innovation from Hite Jinro helps drive growth for tonic water in South Korea

CHANNELS

Convenience stores extends its lead in carbonates in 2025
Coca-Cola's 'Red Ribbon' campaign elevates foodservice engagement

CATEGORY DATA

- Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
- Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
- Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
- Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
- Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
- Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025
- Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
- Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
- Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025
- Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025
- Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
- Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
- Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
- Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
- Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
- Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
- Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
- Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
- Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030
- Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

EXECUTIVE SUMMARY

Health trends and channel shifts are reshaping soft drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health trends drive polarisation amidst static volumes
Inflation fuels shift to private label and varied pack sizes
Health-conscious consumers fuel premiumisation in soft drinks
Soft drinks embraces cultural trends for growth in South Korea

WHAT'S NEXT?

Health awareness and regulation to reshape soft drinks in South Korea
Players will move towards premiumisation, eco-packaging, and digital channels

COMPETITIVE LANDSCAPE

Lotte Chilsung and Coca-Cola Drive Innovation and Health Trends
Character-led innovation drives dynamic growth for Paldo

CHANNELS

Convenience stores is an important distribution channel due to on-the-go appeal
Retail e-commerce platforms are driving efficiency and value in soft drinks
Foodservice sees steady but sluggish recovery towards pre-pandemic levels

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in South Korea

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/carbonates-in-south-korea/report.